FSA Integration Partner

United States Department of Education

Federal Student Aid

eZ-Audit CCB and Enhancement Request Overview

Version 1.0

Final

09/29/2003

Revision History

Date	Version	Description	Author
9/29/2003	1.0	Initial version created for delivery to FSA.	Seth Sinclair

Requirements and CCB Management

Requirement Tracking and CCB Management Overview

The eZ-Audit application was built and tested based on detailed functional and technical requirements developed in the early phase of the project. During the development of Release 1.0 and 1.01, the project team utilized a Change Control Board (CCB) to maintain these requirements and ensure management of project scope. CCB responsibilities included reviewing requests to add, remove, or modify requirements. During the Stabilization phase of the project, the support team captures requests to enhance existing functionality and documents them for future consideration. All eZ-Audit requirements are maintained in a database using Rational Requisite Pro.

Change Control Board Overview

The purpose of the Change Control Board (CCB) is to manage the need to take action against the baselined requirements. Those actions include:

- Adding a new requirement
- Modifying an existing requirement
- Deleting an existing requirement

The need to change requirements may arise during the Design, Development, or Testing phase if the eZ-Audit team identifies that:

- Certain requirements are no longer valid or do not apply
- Existing requirements require further definition OR require modification to be applicable or testable
- Technical limitations will prevent fulfillment of a requirement
- A key area of functionality is missing

Change Control Process

Once requirements are agreed to and baselined by the CCB, Subject Matter Team members have the opportunity to propose changes to the requirements document through use a Change Request Form. The form provides FSA team members a way to request changes and document the reasons for the request. The CCB reviews these requests during regularly scheduled meetings. Participants review each change request and examine potential impacts to schedule and cost. Changes approved by the group will potentially result in:

- An updated version of the requirements document
- Updates made to the project schedule/cost estimates (if necessary)
- Updates made to the Use Cases, Technical Specifications, Test Conditions and Scripts (if necessary)
- Updates made to the CCB Tracking Tool to reflect the CCB decision. The tool will hold summary level information from each request and will track the decisions made by the CCB.

The CCB will make the final determination for all Change Requests. Any issues requiring escalation will be sent to the FSA Project Sponsor for final determination. The following steps outline the procedures for suggesting a change and the CCB review process.

Step one:
Access the Requirement Change Request Form on the eProject Shared Drive. Download a copy of the form.

Step Two:
Complete the CCB Change Request form. The person making the change request will be responsible for compiling and entering the following information:

- ***Title*** – Enter a brief description of the change request.
- ***Author*** – Enter the name of the person who is making the change request.
- ***Date Submitted*** – Add the date that the request is submitted to the CCB lead.
- ***Requirement –*** Enter the requirement that you are proposing to add, delete, or modify.
- ***Requirement Change Request Description*** – Add a detailed explanation of the suggested change and the reasons why the change should be made.
- ***Priority*** – Indicate if the request is High, Medium, or Low Priority

Step Three:
Send the completed Change Request form to the CCB Lead no later than the Friday before the CCB. Forms received after Friday will not be reviewed until the following meeting. When appropriate, the stabilization team will review the request and provide an estimation of the Level of Effort (LOE) required to implement the requirement. The LOE includes the amount of effort estimated to design, build, test, and document the new/changed functionality.

Step Four:
Prepare to discuss the proposed change and any potential impacts in the CCB meeting.

Step Five:
CCB Review – The CCB will review each change request and decide how to handle the suggestion. The CCB members will decide to approve, postpone, or reject each request. For any approved changes, the CCB will agree on impacts to schedule, cost, or documentation. The CCB Lead will document all decisions and update the CCB Tracking Tool to reflect the CCB's actions. Team members responsible for maintaining the requirements document will make any necessary changes and create a new version. Postponed requirements will be added to the requirements matrix but will be not be labeled for a specific deployment. Changes that are rejected by the CCB will be tracked and maintained in the CCB Tracking tool for reference.

Rational Requisite Pro

eZ-Audit requirements are maintained in Rational Requisite Pro (Req Pro) tool. The current requirements package is labeled "eZ-Audit Release 1_01." This matrix contains all requirements that were considered for implementation in Release 1.01, including those deferred from Release 1.0 and additional requirements requests from FSA captured after R 1.0. For each requirement, the following information is captured:

Field	Description
Type	Assigns the requirement to the appropriate matrix in Req Pro (ie Release 1_0 or Release 1_01).
Name	A brief title or description of the requirement.
Text	The full text of the requirement.
Release Schedule	Explains which release in which the requirement was implemented; blank means the requirement has not yet been implemented.
Priority	High, Medium, or Low, determined by Stakeholder input .
Status	Used to indicate if the requirement is active or has been marked for deletion.
Comments	Allows user to enter any comments or notes related to the requirement.
Source	Describes the origin of the requirement (ie. Stakeholder request or Deferred from previous release).

Enhancement Management

Enhancement Tracking and Management Overview

During the course of Production Operations, FSA may request minor changes to system functionality that are not documented as part of the system design. The Operations team reviews these requests and, based on the complexity of the request, decides to implement the change or defer it as a requirement for future consideration. Implementation of accepted enhancements is not a contractual obligation and therefore is addressed only when time permits after production stabilization and deliverable creation activities are complete. The Operations Team provides a bi-weekly status report to provide progress on implementing approved enhancements.

Enhancement Request Process

Step One:
FSA submits requests for enhancements/new requirements to the Operations Team Functional Analyst using the Enhancement Request Form.

Step Two:
The Operations Team reviews the request and determines if it is a reasonable enhancement or a future requirement. Criteria reviewed to make this decision will include:

- Area of functionality
- Level of Effort for Development, Testing, Documentation Updates
- Request Priority

Step Three:

For Requests that are Approved as Enhancements – The Operations Team will log enhancements as a Level 4 SIR in Rational ClearQuest. All enhancements will be put into a "work queue." The Operations team will develop, test, and deploy these enhancements when the Operations/Deliverable workload permits.

For Requests that are Deferred as Future Requirements – The Operations Team will add the requirements to the Requirements Matrix in Req Pro for future consideration.